

Cal TF – PAC Meeting



CALIFORNIA
TECHNICAL FORUM

AUGUST 8, 2022
ANNETTE BEITEL
AYAD AL-SHAIKH
ARLIS REYNOLDS

PAC Agenda

- Quick Updates
 - Technical Forum
 - eTRM Release
- Leveraging the eTRM for Custom, Part 3 – Custom Vision and Roadmap
- Looking forward
 - September PAC Meeting
 - Business Plan Update

Technical Forum

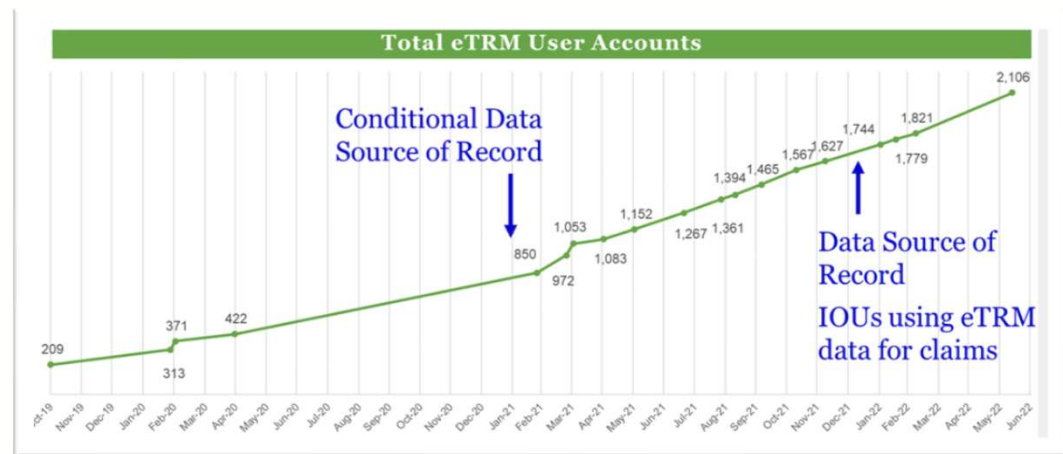
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- **36** total TF members
 - **24** returning members
 - **12** new members
- Highly qualified new members
 - **18 years** average years of experience in EE
 - **10 years** average years of experience with collaboratives
 - **10** professional engineers
- 2022 Subcommittees
 - New Measure Subcommittee
 - Program Data Element Subcommittee
 - Custom Subcommittee

eTRM Update

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- eTRM 2.4 Released – *Live on 8/4/2022!*
- Data Analytics Tools
- Performance Benchmark Enhancement
- Security Audit
- Program Data Elements
- Ad Hoc Enhancements



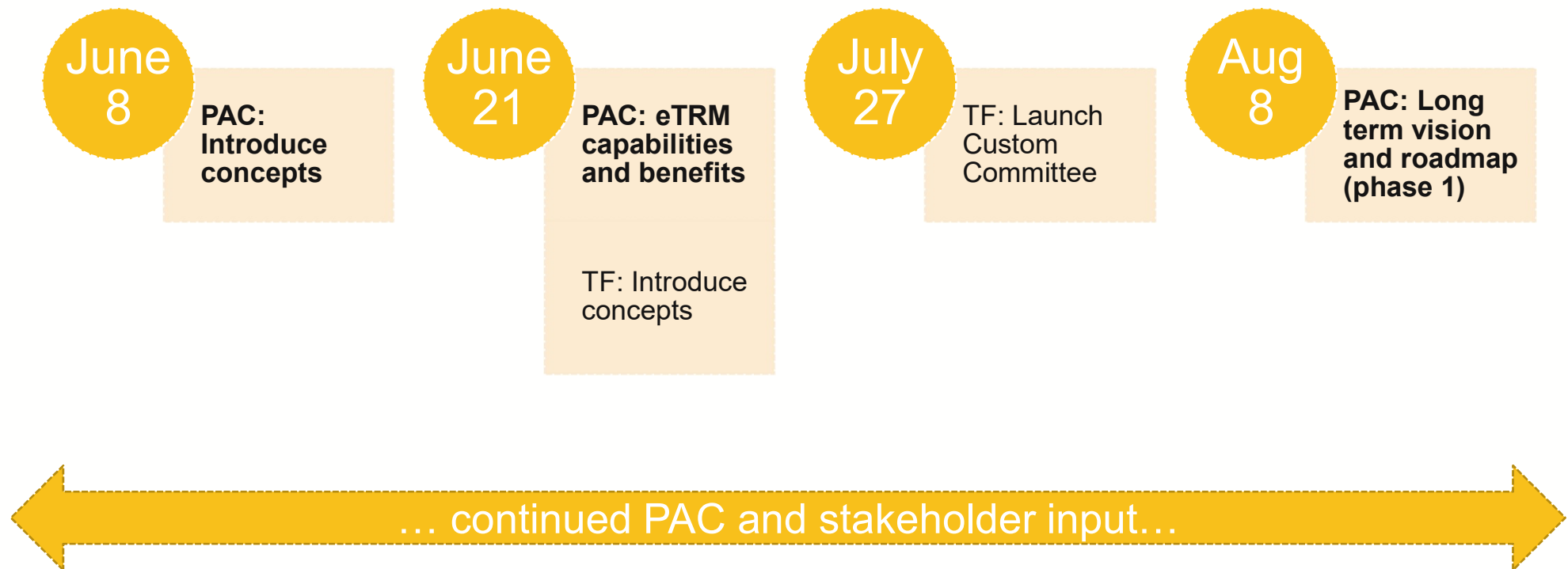
Custom Vision and Roadmap

- Recap to date
- Subsequent meetings
- Vision for EE and Custom
 - Modern, user-friendly integrated user interface
 - Streamlined data flow to improve efficiency and data integrity
 - Structured database for enhanced data mining and data analytics
- Roadmap, Phase 1
- Stakeholder Input
- Next Steps

Recap to date

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- Discuss how existing eTRM tools/processes can be used to standardize and streamline custom projects
 - Include how Cal TF can provide value



User Feedback

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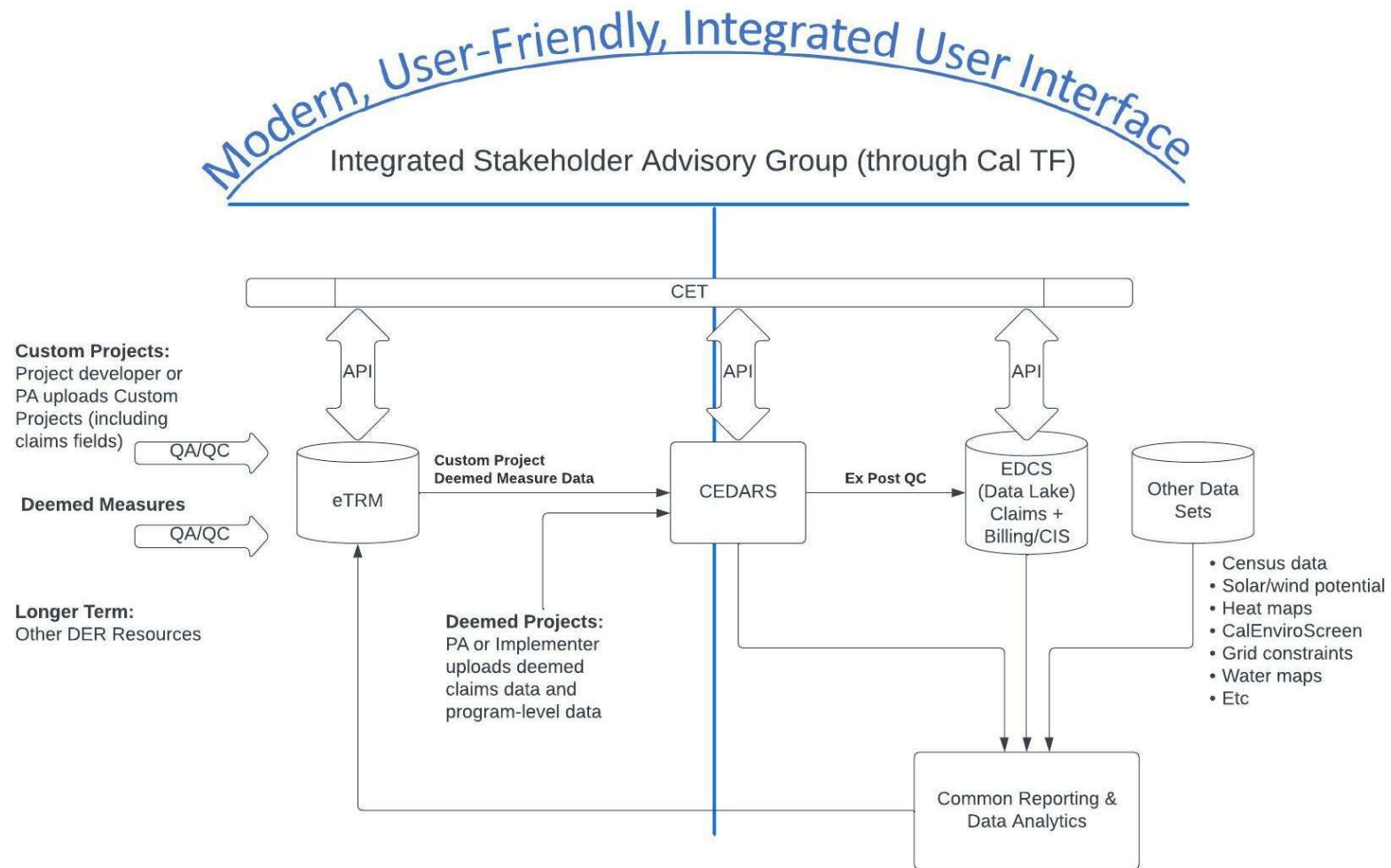
- Organize and standardize custom guidance, tools, and data requirements
 - standard data requirements
 - eTRM library of calculation tools
 - standard template for custom calculators
 - standard custom project package
- Disposition repository and digest
 - replace www.caenergyguidance.com
- Standardized custom nomenclature
- Automate and enable EM&V QA
 - CPR not connected with ex post claims
- Seamless connection between eTRM and CEDARS/CET
 - minimize manual data manipulation/transfers
- Attribution and baselines (“third rails”)
- Role of eTRM in “transactive” energy framework
- Using “integrated” eTRM to enable advanced data analytics to:
 - better target DER resources to meet customer needs
 - support regulator, administrator, and implementer planned
 - guide PA and program targeting and grid constraints

... continued PAC and stakeholder input...

Integrated EE Data Flow

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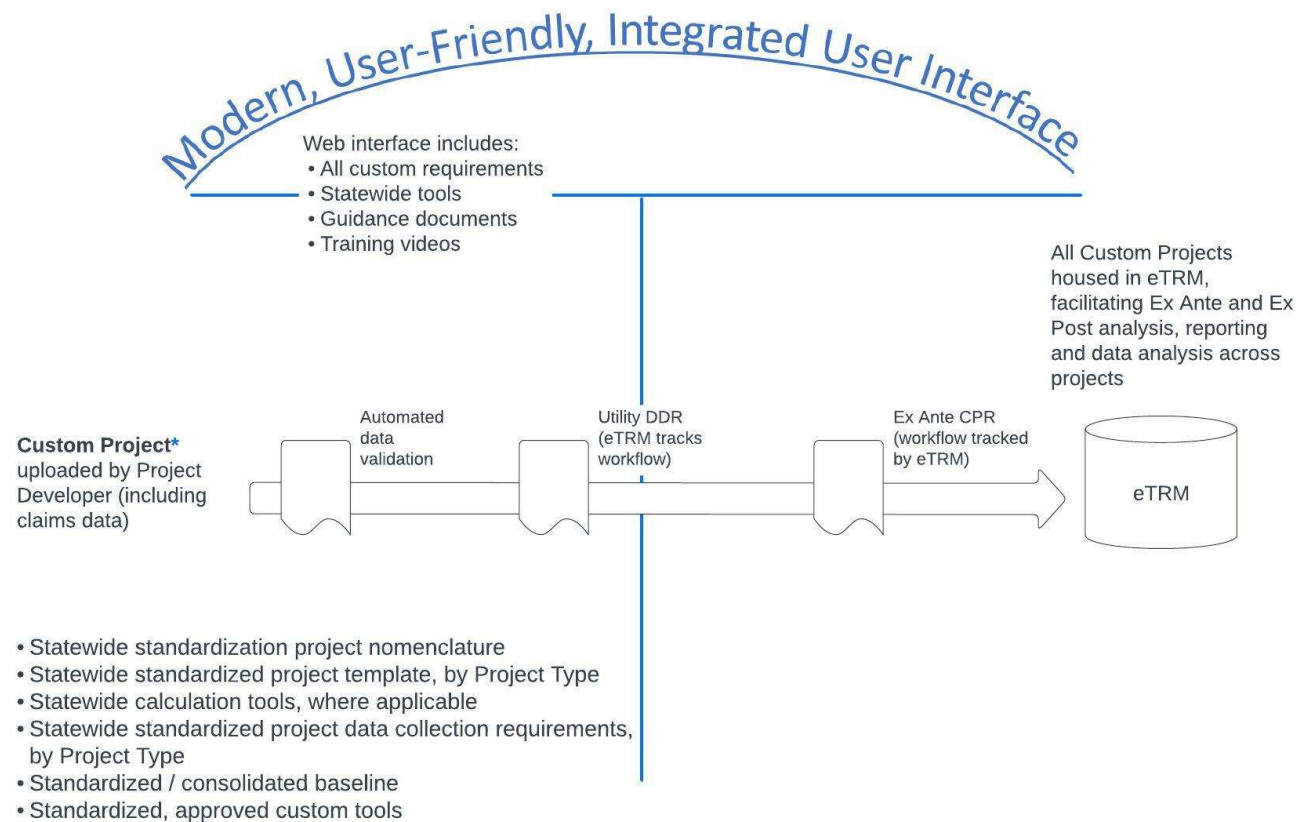
Integrated Data Flow



Integrated Custom Data Flow

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Integrating Custom Projects into the eTRM



**All PII encrypted*

Benefits for Custom

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Cost Savings



Time Savings



Customer
Experience



Standardization



Transparency



Stakeholder
Engagement

There remains significant EE savings opportunity for custom measures. We can capture additional EE savings and reduce costs if we 1) organize, simplify, streamline, and standardize custom guidance, tools, and processes and 2) clarify regulatory requirements.

Custom Roadmap – Phase 1

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Statewide standard “semi-deemed” measures



Statewide standard custom measure nomenclature



eTRM enhancements for Custom Measures



Review regulatory requirements and disposition dbase



eTRM options for CPR & CMPA



... continued PAC and stakeholder input...

Next Steps for Cal TF

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- Ongoing stakeholder input to identify user priorities
- Engineering
 - Collect custom tools/data requirements (IOU/POU)
 - Review/standardize through Cal TF subcommittees.
- eTRM Updates
 - Define enhancements for custom measures and tools

Looking Forward

- September PAC Meeting
- Business Plan Update
- Contact anytime:
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